



SIMIAN systems

SiteMailer 2 User Manual

Sitellite Professional Edition

Introduction

SiteMailer 2 is an enterprise-level newsletter campaign manager. It provides advanced features for importing, managing and publishing newsletters in both email (HTML and automatically generated text-only formats), RSS, and website browsable archive.

SiteMailer 2 can manage multiple lists, use customizable templates for designing professional emails, embed dynamic content and personalization into emails, save drafts for later, and preview messages before sending. Email sending is also fault-tolerant through the use of a journalling system which ensures that even if a message fails to send, it will restart where it left off without sending duplicates or missing any subscribers. SiteMailer 2 can handle 100,000+ subscriber lists.

SiteMailer 2 also has bounce-back handling and privacy protection features such as email verification and double opt-in for new subscribers built-in.

Logging In

To access the SiteMailer login screen, first log into Sitellite then enter the *Control Panel*. From here, you will see SiteMailer 2 under the *Tools* menu in the top right of the screen.

Alternately, you can access SiteMailer 2 directly by going to the following address and entering your Sitellite username and password:

<http://www.example.com/index/sitemailer2-app>

Simply change *www.example.com* to your own website domain name.

Menu Overview

Once logged into SiteMailer 2, you will see a series of tabs across the top of the application. These are:

1. Newsletters
2. Subscribers
3. Drafts
4. Templates

5. Campaigns
6. Stats
7. Settings
8. Help

This manual will follow the menu tabs for documenting the SiteMailer 2 user interface, then add some additional configuration information at the end.

Newsletters

Adding a newsletter

To add a newsletter, click on the *Add Newsletter* link. In SiteMailer 2, you can create an unlimited number of newsletters, and an individual subscriber can be subscribed to one or more of them.

A newsletter has the following properties:

1. Name - the general name of the newsletter
2. From Name - the name to send messages from
3. From Email - the email address to send messages from
4. Template - which template to render messages with
5. Subject - a default subject line for each mailing
6. Public - whether this newsletter is visible on the public archive/subscription screens or not
7. Import Subscribers From - this allows you to import subscribers from existing newsletters into your new ones automatically

When you're ready to create your new newsletter, simply click the *Create* button.

Modifying a newsletter

To change the properties of a newsletter, from the *Newsletters* screen, click on the pencil icon next to the newsletter. This will bring up a form

similar to the *Add Newsletter* form which allows you to change all the same properties of the newsletter.

Deleting a newsletter

To delete a newsletter, check it off in the list then click on the red X icon at the top of the list. SiteMailer 2 will prompt you to confirm your decision and then will proceed to delete the newsletter.

Sending a message

To send a message, click on the envelope icon next to the newsletter. This will bring up the *New Message* form with the following fields:

1. From Name - allows you to customize this value on a message-by-message basis
2. From Email - allows you to customize this value on a message-by-message basis
3. Template - allows you to customize this value on a message-by-message basis
4. Re-occurring - whether this individual message should automatically be sent again on a weekly, bi-weekly or monthly basis -- note that this requires the scheduler to be running correctly
5. Date - the date to send the message on, allowing you to publish a message in advance and send it automatically at a later date
6. Time - the time to send the message on
7. Newsletters - allows you to send the same message to subscribers from more than one newsletter at once
8. Subject - allows you to customize this value on a message-by-message basis
9. Message Body - the actual message body as a visual editor

Please note that the editor has a few limitations compared to editing a web page. Namely, the box and form choosers will not work. Most other functions should behave as expected.

To send the message, click the *Send Message* button. To instead save it as a draft to modify and send later, click the *Save as Draft* button.

To send a test message to yourself to verify how the message will be seen by others, click on the *Send Test Message* button. A popup dialogue will appear asking for the email address to send the test message to.

Sent messages

To see messages that have previously been sent, click on the icon with several envelopes. The following screen will show you when each message was sent, as well as its status (if it's still being sent) and a partial calculation of how many times it's been viewed or bounced.

Subscribers

Subscribers are available under the *Subscribers* tab or by clicking on the *Subscribers* icon next to a given newsletter in the *Newsletters* tab. Subscribers are managed as one large list that can be assigned to one or more newsletters.

Adding a subscriber

We'll cover later how a subscriber can add themselves. To add a subscriber manually, click on the *Add Subscriber* link. This brings up a form to create a new subscriber with the following properties:

1. Email Address
2. First Name
3. Last Name
4. Organization - the name of the company the subscriber works for (optional)
5. Web Site - the website of the subscriber (optional)
6. Newsletters - which newsletters the subscriber is subscribed to

Once you've filled out the form, click the *Create* button to create the subscriber.

Importing subscribers

Subscribers can be imported individually from vcard files exported from 3rd party address book software, as well as from CSV or "comma-separated values" files in bulk. CSV files can be exported from Excel and other spreadsheet and database software.

To import subscribers, click on the *Import Subscribers* link which brings up a form. Next, click on the *Browse* button next to the vCard or CSV field and browse your computer filesystem for the subscriber vcard or csv list. Select the newsletters you wish to subscribe the new subscribers to then click on the *Next* button.

For vCard imports, the following screen will verify the vcard data and allow you to confirm it before saving the subscriber to the database.

For CSV imports, the following screen will allow you to assign values from the CSV data to correspond to the properties of a subscriber in SiteMailer 2.

Modifying a subscriber

To change the properties of a subscriber, from the *Subscribers* screen, click on the email address of the subscriber. This will bring up a form similar to the *Add Subscriber* form which allows you to change all the same properties of the subscriber.

Deleting a subscriber

To delete a subscriber, check them off in the list then click on the red X icon at the top of the list. SiteMailer 2 will prompt you to confirm your decision and then will proceed to delete the subscriber.

Mass unsubscribe

To mass unsubscribe a group of users, click on the *Mass Unsubscribe* link then browse for a CSV file containing the list of subscribers. Next, select the newsletter(s) to unsubscribe the subscribers from then click the *Next* button.

The following screen will verify the correct field from the CSV data that corresponds to the subscriber email addresses.

Search parameters and sorting

You can sort the subscriber list by clicking on any of the table headings. An arrow shows which column the list is currently being sorted by, and which way (alphabetically ascending or descending). Click on the same header again to change between ascending and descending sorting order.

You can also search the subscriber list using a text search that searches the email, name, organization name and website properties, as well as the newsletter and status of the subscribers. The search parameters and sorting form a powerful combination for managing users.

Drafts

Messages that have been saved as drafts appear under the *Drafts* tab. From here you can click on the subject of a given draft to continue to edit it or send it. You can also delete unwanted drafts as well.

Clicking on a draft opens it up in the same editor found in the *Newsletters* section.

Templates

Messages in SiteMailer 2 are sent in HTML format with an automatically generated plain text version accompanying them for subscribers whose email preferences are set to prefer plain text messages.

Templates are used to add style and branding to outgoing emails, as well as personalization of the messages, using a combination of HTML and tags in the SimpleTemplate format. SimpleTemplate is a template format used throughout Sitellite by application developers, and is a simplified template format compared to Sitellite's main XML-based template format. For a complete SimpleTemplate reference, please visit the following page:

<http://www.sitellite.org/index/tutorials-story-action/story.59>

Adding a template

To add a template, go to the *Templates* tab and click on the *Add Template* link. This will open the template editor.

A template has only two properties, a name and a body. The name can be anything you would like. The body must contain HTML and SimpleTemplate tags.

At the very least, the one required tag for your message to appear is the *{body}* tag. This puts your message body into the template at the spot where the tag is found.

The full list of available tags are as follows:

1. *{body}* - inserts the message body
2. *{date}* - inserts the current date
3. *{email}* - inserts the subscriber's email address
4. *{firstname}* - inserts the subscriber's first name

5. {fullname} - inserts the subscriber's first and last name
6. {lastname} - inserts the subscriber's last name
7. {organization} - inserts the subscriber's organization name
8. {tracker} - inserts an invisible tracker that allows SiteMailer 2 to track how many times the message has been read by subscribers -- note that this number is never completely accurate because many subscribers may have images disabled in their email clients, which are required for this feature to work.
9. {unsubscribe} - inserts a link which the subscribers can use to unsubscribe themselves
10. {website} - inserts the subscriber's website
11. {campaign_link=ID} - inserts a link to the specified campaign based on its ID number. See the *Campaigns* section to find out more about campaigns.

To save a template, click on the *Save* button. You can also preview your templates with the *Preview* button.

Campaigns

Campaigns are links which are tracked for their number of clicks in outgoing messages. Campaign links can be added using the following Simple-Template tag.: {campaign_link=ID} where ID is the campaign number, for example {campaign_link=2}.

To find the campaign number, create a new campaign under the *Campaigns* tab and you will see the campaign ID in the link to that campaign on the *Campaigns* page. It will appear in the form *?id=ID* at the end of the link.

This tag will be turned into a URL when the template is rendered, so the best way to place it is to put it into an HTML link tag like this:

```
<a href="{campaign_link=2}">Link text</a>
```

This would make a link with the text *Link text* to the campaign's website, which is automatically tracked for clicks. Alternately, you can use an image instead of text for things like banner ads and graphical advertisements. For example:


```
<a href="{campaign_link=2}"></a>
```

Stats

The stats screen shows you how many of your subscribers are active, disabled or unverified. A disabled subscriber has requested themselves to be removed from your newsletters. An unverified subscriber hasn't confirmed their email address.

Settings

SiteMailer 2 has many settings which can be controlled from the *Settings* tab. These include:

1. Subscriber registration - the degree of detail required from new subscribers. The available options are:
 1. None - disabled public subscriptions entirely
 2. Email-only - requires only their email address to subscribe (default)
 3. Collect all data - requests but does not require all of the properties of a subscriber such as their name and organization
 4. All data required - requires a subscriber to provide all of their information to subscribe to your list
2. Subscribe email verification - whether to require new subscribers to verify their email address by confirming it in a test email message (default is yes)
3. Unsubscribe email verification - whether to require unsubscription requests to be verified via a confirmation email (default is yes)
4. Public archive of messages - whether to create a publicly visible archive of messages so that others may see them and search engines can index them (default is yes)
5. RSS subscribers - whether to allow subscribers to subscribe anonymously using RSS instead of email (default is yes)
6. Confirmation email address - The email address to send confirmation messages from

7. Confirmation email name - The name to send the confirmation messages from
8. Confirmation email subject - The subject line of the confirmation messages
9. Domain SiteMailer 2 resides on - The domain name that the website runs on. This is used by the mailer script to correctly fill in link values.
10. Bounced message detection settings:
 1. Disable subscribers after bounces - default is 2
 2. Email address for bounced messages - this is a real email account which SiteMailer 2 will check for bounced messages
 3. Email password for bounced messages - the password for the email account
 4. Server for bounced messages - the server name for the email account
 5. Port for bounced messages - the server port for the email account

Website/Public Features

SiteMailer 2 features several publicly accessible features. These include the ability for visitors of your website to subscribe and unsubscribe themselves to your newsletters (only ones marked public of course). They also include the ability to view previously sent messages as web pages linked to from the newsletters page, and the ability to subscribe to your newsletters as RSS feeds, which are quickly becoming a popular way of subscribing to information online as all of the major web browsers now include RSS support built-in.

To access the public features of SiteMailer 2, create a link somewhere on your website to the following address:

<http://www.example.com/index/sitemailer2-public-action>

Installation/Configuration

SiteMailer 2 comes pre-installed with Sitellite Enterprise Edition, however some additional configuration is also necessary to enable the message queue, bounce-back handling, and scheduling of messages in the future.

These steps are described in the file *inc/app/sitemailer2/install/INSTALL* and are as follows:

Make the settings files writable and the scripts executable

Shell commands:

```
cd /path/to/sitellite
cd inc/app/sitemailer2
chmod -R 777 data conf
chmod -R 755 script
```

You can also do this via FTP if your FTP client has the ability to edit file permissions on the server.

Configure your outgoing mail server

Open the file *inc/app/sitemailer2/conf/properties.php* and follow the instructions in that file to set the outgoing mail server, then verify any additional settings by logging into the SiteMailer 2 administrative interface and going to the *Settings* tab.

Edit the startup and bouncer scripts

Open the *start.sh* and *start_bouncer.sh* scripts in the *inc/app/sitemailer2/script* folder as follows. You will need to know the absolute path to your PHP command line binary. To find this out, on the command line try typing:

```
which php
```

Or:

```
which php-cli
```

Add the folder (not including the PHP binary file name) to the line beginning with *export PATH=* in both of these files and save them, for example:

```
export PATH=/usr/local/bin:/usr/bin:/bin
```

Where the PHP binary was found at */usr/local/bin/php*. You can specify multiple locations in the *PATH* value by separating them with commas, and it's a good idea to leave the defaults in place. The startup and bouncer scripts should now be ready to run.

Configure the scripts to be executed by Cron

To edit your cron tab from the command line, enter the following command:

```
crontab -e
```

This will bring up your cron tab for editing in your default text editor, most likely *Vi*. Add the following line:

```
0,10,20,30,40,50 * * * *  
/path/to/sitellite/inc/app/sitemailer2/script/running.sh
```

This will cause Cron to execute the `running.sh` script once every 10 minutes, which simply auto-starts or auto-restarts the message queue, bounce-back handler, and scheduler daemons so that they are ready whenever SiteMailer 2 adds an action to the queue or whenever a bounced message arrives. Make sure to replace `/path/to/sitellite` in the above example with the actual path to your Sitellite installation.